

PROCUREMENT PLANNING

CLASSROOM EXERCISES

FEDERAL ACQUISITION INSTITUTE

CURRICULUM OF PROCUREMENT
TRAINING COURSES

CURRENT THROUGH
FAC 90 - 20

OFFICE OF ACQUISITION POLICY
GENERAL SERVICES ADMINISTRATION

CLASS EXERCISES

LESSON 1: REVIEWING PURCHASE REQUESTS

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Reviewing Purchase Requests

REQUISITION FOR EQUIPMENT, SUPPLIES, OR SERVICES						1. PAGE 1 OF 4 PAGES			
2. REQUISITION NUMBER F34599		3. STOCKROOM CONTROL NO.		4. STOCKROOM CODE NO.		5. DATE PREPARED 10/15/91		6. JOB NUMBER	
7. TO (Stockroom - name and location) Director of Contracting Federal Dept. of Administrative Services 552 Landing Blvd. Washington DC 20002					8. FROM (Requisitioning point - name and location) Forest Hill Federal Management Office Headquarters, Office of Parks & Recreation 2426 Carnation St. Washington DC 20400				
9. ALLOTMENT AND EXPENSE ACCOUNTS CHARGEABLE 127.2.SOOPO920.10.21.H40.110					10. SIGNATURE OF APPROVING OFFICER				
11. FOR INFORMATION CALL (name, telephone number, and extension) Francis Love (110) 370-5511 Ext. 32					12. TITLE OF APPROVING OFFICER Executive Assistant				
FORM OR STOCK NUMBER (13)	DESCRIPTION OF ARTICLES OR SERVICES (14)			QUAN- TITY (15)	UNIT (16)	UNIT PRICE (17)	AMOUNT (18)		QUANTITY RECEIVED (19)
0001	Grounds maintenance			6	mths	9000.	54,000	00	
20. DELIVER TO (Give complete address, including ZIP Code) Desert Storm Museum 3115 Keystone Dr. Washington DC 20040 ATTN: J. Gallo Phone: (110) 485-1234					TOTAL AMOUNT ➡		45,000	00	
					21. SHIPPED VIA FREIGHT PARCEL POST EXPRESS MAIL				
22. FILLED BY			23. PACKED BY			24. CHECKED BY			
25. BILL OF LADING NUMBER								26. DATE SHIPPED	
27. THE ABOVE ITEMS OR SERVICES WERE RECEIVED EXCEPT AS INDICATED ABOVE.									
SIGNATURE				TITLE				DATE	
NOTE: Acquisition of nonexpendable items are to be fully justified on face of requisition.									

Reviewing Purchase Requests

Desert Storm Museum
Grounds Maintenance
Performance Work Statement

Part 1. Scope of Work

1.1 General

Provide grounds maintenance at the Desert Storm Museum starting April 1, 1992. Grounds maintenance shall consist of mowing, trimming, raking, edging, and watering lawn areas; mulching, and weeding flower beds, shrub beds, and trees; and removing trash from grounds.

Part 2: Materials

2.1 Necessary tools, equipment, supplies, and materials for the work at the Museum shall be provided by the Government.

2.2 Mulch and water will be provided by the Government.

Part 3: Execution

3.1 General

Prior to mowing, remove trash, twigs, and debris that may injure persons, property or equipment. Clippings and debris from all operations under this contract shall be promptly removed from walks and non-lawn areas to an area designed by the Contracting Officer's Representative (COR).

3.2 Mowing

3.2.1 All mowers shall be set to cut at not less than 2 inches as measured on a flat smooth surface.

3.2.2 Grass shall be mowed on a 7 day cycle except during July and August when mowing shall be on a 14 day cycle or when growth rate is such that these frequencies are not practical. Grass shall be mowed whenever the average height is 1 1/4 times the mower setting. Mowing may be delayed at the discretion of the COR.

3.2.3 Mowing shall be performed using sharp, well maintained equipment and in a manner which will not leave visible windrows or piles of clippings or ridges, scalped areas or other uneven cutting.

3.3 Trimming and Edging

Trimming and edging shall be at the request of the COR. Trim along edges of plant beds and next to all vertical surfaces, i.e., signs, benches, light fixtures where mowing is not possible; edge of sidewalks and outside curbs; and remove weeds and grass growth from

Reviewing Purchase Requests

curbs and crack areas. Trim and edge to produce a neat, crisp, clean appearance and to prevent encroachment of lawn grass into shrubs or other areas not designed to have turf.

Trimming and edging shall be done at least once per week at all areas.

3.4 Mulching and Weeding

After weeding, apply Government-provided mulch around approximately 30 trees, shrubs at Museum entrance, and shrubs along the side of the Museum. Apply uniformly covering the area of plant surface beds at a loose measurement depth of at least 3 inches of as otherwise directed by the COR.

3.5 Watering as required and directed by the COR to maintain adequate soil moisture to promote deep root of plant materials. Perform slowly to avoid damage to planting and obtain depth penetration of 4-5 inches.

3.6 Groundskeeping

Remove all leaves, trash, and debris from landscaped areas, walks, and roadways to enhance the appearance of the area and to protect visitors and resources, as directed by the COR. Promptly load and haul trash to designed on-site dumpsters.

Part 4: Work Schedule Procedures

4.1 Work shall commence on April 1, 1992 and shall not exceed September 30, 1992 including a one year option. The Government reserves the right to exercise the option for grounds maintenance services on October 1, 1992. Written notification to the contractor 30 days prior to the exercise of the option is required.

4.2 A log sheet will be maintained by the COR showing times in/out of the contractor's crew, number of crew, and tasks performed.

4.3 An advance work schedule (weather permitting) will be provided to the COR on Friday of each week for the following week, including schedule for mowing.

4.4 Work schedule shall be as follows:

<u>Months to Work</u>	<u>Days to Work</u>	<u>Hours to Work</u>
4/1 thru 9/30	Wednesday & Thursday	8:30 am to 12:00 noon 12:30 pm to 3:00 pm

4.5 Should it be raining at the time of departure of the contractor's crew from the staging area, contractor will not report to the Desert Storm Museum for work that day. The crew shall be dismissed during the day from the area should rain start after reporting to the work site. The dismissal will be at the direction of the COR if conditions prohibit completion of the tasks outlined in the scope of work.

Part 5: Property Damage

The contractor shall be responsible for replacement of government equipment or plant material damaged through any negligence caused by the Contractor's crew.

Reviewing Purchase Requests

Grounds Maintenance, Cont.

Part 6: Recommended Sources

1. Fantastic Lawns at Fantastic Prices
3434 Lawn Ave.
Washington, DC 20044

2. Green Lawns 4 U
30 North Greenway St.
Washington, DC 20039

3. The Green Thumb
1160 Greenhouse Lane
Washington, DC 20045

Part 7: Billing Procedures

Billing shall be on a daily rate basis, invoicing monthly. Contractor will provide an average of 33 hours of 100% efficiency rate per day. The contractor shall provide the Government a current list of each employee's efficiency rate. Late submission or the inability to provide such a list shall result in delaying payment until all appropriate information is provided.

Send invoices to : Administrative Officer
Forest Hill Federal Management Office
Headquarters, Office of Parks & Recreation
2426 Carnation St.
Washington DC 20400

Attention: Vanessa Chamberlain

Reviewing Purchase Requests

REQUISITION FOR EQUIPMENT, SUPPLIES, OR SERVICES						1. PAGE 1 OF 1 PAGES			
2. REQUISITION NUMBER F34594		3. STOCKROOM CONTROL NO.		4. STOCKROOM CODE NO.		5. DATE PREPARED OCTOBER 15, 1991		6. JOB NUMBER	
7. TO (Stockroom - name and location) Director of Contracting Federal Dept. of Administrative Services 552 Landing Blvd. Washington DC 20002					8. FROM (Requisitioning point - name and location) Forest Hill Federal Management Office Headquarters, Office of Parks & Recreation 2426 Carnation St. Washington DC 20400				
9. ALLOTMENT AND EXPENSE ACCOUNTS CHARGEABLE					10. SIGNATURE OF APPROVING OFFICER				
11. FOR INFORMATION CALL (name, telephone number, and extension) Steven Wonder (110) 370-5100 Ext. 15					12. TITLE OF APPROVING OFFICER Executive Assistant				
FORM OR STOCK NUMBER (13)	DESCRIPTION OF ARTICLES OR SERVICES (14)			QUAN- TITY (15)	UNIT (16)	UNIT PRICE (17)	AMOUNT (18)		QUANTITY RECEIVED (19)
0001	Fireworks display for Desert Storm Museum dedication ceremony			1	display	75,000	75,000	00	
20. DELIVER TO (Give complete address, including ZIP Code) Desert Storm Museum 3115 Keystone Dr. Washington DC 20040 ATTN: J. Gallo Phone: (110) 485-1234					TOTAL AMOUNT ➡		75,000	00	
					21. SHIPPED VIA FREIGHT PARCEL POST EXPRESS MAIL				
22. FILLED BY			23. PACKED BY			24. CHECKED BY			
25. BILL OF LADING NUMBER								26. DATE SHIPPED	
27. THE ABOVE ITEMS OR SERVICES WERE RECEIVED EXCEPT AS INDICATED ABOVE.									
SIGNATURE				TITLE				DATE	
NOTE: Acquisition of nonexpendable items are to be fully justified on face of requisition.									

Reviewing Purchase Requests

REQUISITION FOR EQUIPMENT, SUPPLIES, OR SERVICES						1. PAGE 1 OF 5 PAGES			
2. REQUISITION NUMBER F34593		3. STOCKROOM CONTROL NO.		4. STOCKROOM CODE NO.		5. DATE PREPARED OCTOBER 15, 1991		6. JOB NUMBER	
7. TO (Stockroom - name and location) Director of Contracting Federal Dept. of Administrative Services 552 Landing Blvd. Washington DC 20002					8. FROM (Requisitioning point - name and location) Forest Hill Federal Management Office Headquarters, Office of Parks & Recreation 2426 Carnation St. Washington DC 20400				
9. ALLOTMENT AND EXPENSE ACCOUNTS CHARGEABLE 127.2.SOOP910.10.31.H40.923					10. SIGNATURE OF APPROVING OFFICER				
11. FOR INFORMATION CALL (name, telephone number, and extension) Gene Poole (110) 370-5511 Ext. 40					12. TITLE OF APPROVING OFFICER Executive Assistant				
FORM OR STOCK NUMBER (13)	DESCRIPTION OF ARTICLES OR SERVICES (14)			QUAN- TITY (15)	UNIT (16)	UNIT PRICE (17)	AMOUNT (18)		QUANTITY RECEIVED (19)
0001	TV Surveillance Equipment						84,500	00	
	¥video cameras			5	ea.				
	¥video monitors			5	ea.				
	¥video cassette recorder			1	ea.				
	¥master control			1	ea.				
0002	X-ray Inspection System			4	ea.	26,000	102,000	00	
							1200	00	
0003	Credenza, Office, 29X66X18			4	ea.	300			
20. DELIVER TO (Give complete address, including ZIP Code) Desert Storm Museum 3115 Keystone Dr. Washington DC 20040 ATTN: Julius Gallo Phone: (110) 485-1234					TOTAL AMOUNT ➡		187,700	00	
					21. SHIPPED VIA FREIGHT PARCEL POST EXPRESS MAIL				
22. FILLED BY			23. PACKED BY			24. CHECKED BY			
25. BILL OF LADING NUMBER							26. DATE SHIPPED		
27. THE ABOVE ITEMS OR SERVICES WERE RECEIVED EXCEPT AS INDICATED ABOVE.									
SIGNATURE				TITLE				DATE	
NOTE: Acquisition of nonexpendable items are to be fully justified on face of requisition.									

Reviewing Purchase Requests

PERFORMANCE WORK STATEMENT
SURVEILLANCE EQUIPMENT
DESERT STORM MUSEUM

Item 0001

1. Scope of Work

1.1 The work to be performed consists of furnishing all plant, labor, materials, equipment, tools, and transportation necessary to install television surveillance systems at the Desert Storm Museum.

1.2 The contractor shall perform all work in accordance with applicable government regulations. Work shall be accomplished in such a manner as to minimize the possibility of damage to government property, loss of production time and to safeguard the health and welfare of government and contractor personnel.

2. Surveillance Equipment

The contractor shall install and provide the most contemporary television surveillance equipment under the contract. The surveillance system consists of 5 cameras, 5 monitors, one video cassette recorder (VCR), and one master control.

2.1. Cameras

2.1.1 The video cameras shall operate on 24 VDC. The cameras can be required to have 180 degree horizontal and 90 degree vertical surveillance with zoom capability and controlled from where the monitors will be located. The cameras shall be low light compensated.

2.1.2 Exterior cameras shall also be weatherproof. Cameras shall be equipped with a filter or some feature to avoid focus problems as a result of sun rays. Cameras shall be installed in tamperproof housing and capable of providing coverage of areas as specified.

2.1.3 Cameras shall have automatic sweep and characterized with random movement to prevent someone from becoming familiar with its system of movement. The cameras shall be equipped with manual operation and the capability to zoom in on any location within the scope of the area covered.

2.2 Video Monitors

2.2.1 The video monitors shall have 800 line resolution switchable DC restoration, regulated power supply, 14 KV bright display, a video selector switch, 75 ohm switchable termination, CRT preheating, isolated power transformer, led power indicator, 15 inch picture tube, 110 degree deflection, integral explosion protection, two UHF loop-through video connectors.

2.2.2 Monitors are to operate on 115 VAC, composite video capable of being connected to a video cassette recorder.

Reviewing Purchase Requests

2.3 Video Cassette Recorder (VCR)

2.3.1 The VCR shall be compatible with system and have both record and playback capability operable on 115 VAC.

2.3.2 The VCR shall be capable of recording from any monitor.

2.4 Master Control with following features:

2.4.1 The Master Control shall be installed in a cabinet in the security area of the museum. The control unit shall allow zoom, horizontal and vertical control of each camera location separately. Operate on 115 VAC, 60 hz.

3. Location of Equipment

3.1 Cameras

3.1.1 Camera #1 to be located on the first floor east hallway across from the men's and women's lavatories.

3.1.2 Camera #2 to be located across the street of the northeast corner of the museum mounted on telephone pole.

3.1.3 Camera #3 to be located at the southeast corner on top of the museum.

3.1.4 Camera #4 to be located at the west corner on top of the museum above the back door of the museum.

3.1.5 Camera #5 to be located in the foyer at the entrance of the museum on top of the museum for viewing the front and vicinity with horizontal and vertical sweep movement.

3.2 Other Equipment

3.2.1 The VCR, master control and monitors shall be installed and housed in a console for easy access and operation of the surveillance system.

4. Procedures for Installation

4.1 Workmanship:

4.1.1 The work shall be executed in a careful and professional manner and in compliance with the accepted trade practices by personnel skilled and experienced in installation of television surveillance equipment.

4.1.2 The contractor shall agree, upon installation of all television surveillance equipment and its associated intercomponent wiring/cabling and conduit under the contract, that the associated intercomponent wiring/cabling and conduit shall be the property of the government.

4.1.3 The government reserves the right to request removal of all the associated intercomponent wiring/cabling and conduit from the museum by the contractor at no expense to the government.

4.2 Hours of Work

All installation work as required by the contractor shall be performed during normal duty hours. These hours are 7:30 am to 4:15 pm, Monday thru Friday.

4.3 Wiring

The contractor shall install all equipment listed and any additional miscellaneous parts/materials necessary for completely operational system. Electrical wiring shall be installed in accordance with the National Electrical Code - 1991. Overhead wiring shall be installed at a maximum height and as approved by the COR.

5: Inspection and Acceptance

5.1 The Quality Assurance Evaluator (QAE), Victor Newman or alternate, Bradley Carlton, are responsible for inspection and acceptance of work performed under this contract. The contractor shall notify the QAE prior to commencing installation work and upon completion of the installation work for certification of services.

6. Training

6.1. Upon acceptance of the new TV Surveillance system by the COR, the contractor shall provide initial training as determined by the QAE to the building monitor responsible for the operation of the TV surveillance systems.

6.2 The QAE, building monitor and contractor shall agree when the training sessions are to be held and its duration. Training shall be completed not later than 30 days after the installation acceptance date.

7. Recommended Sources

1. Alarm & Security Equipment Inc.
50 West Town St.
Washington, DC 10059
(110) 450-7800

2. Tri-State Unlimited Security Systems Inc.
2504 Denver St.
Brooklyn, SC 23555

Reviewing Purchase Requests

Item 0002
X-Ray Fluoroscopic System
Model 58367

1. AC Power Cord: not less than 10 feet long
2. X-ray beam collimator: adjustable
3. Indicator Lights: Built-in indicating power on, x-ray on, and overheating conditions
4. Indicating meters: Built-in for line voltage and current indications
5. Controls: A. Remote operating cord: Not less than 8 feet long
B. Line Voltage adjustment: Built-in
6. Thermal overload protection: Built-in
7. X-ray tube output: Continuous output X-ray beam rated at 80 kV peak at 3 mA; able to be reliably used in screen fluoroscopy, with conventional or Poloraid X-ray film, and with image storage panels
8. Overall size: Not to exceed 2 ft. x 2.5 ft. x 2 ft.
9. Operational Weight: No greater than 50 lbs.
10. Power Requirements: 110-130 vac single phase 50/60 HZ
11. Powered Conveyor: A. able to handle up to 150 lbs.
B. 4 feet long

Recommended Source

Quality Detection Systems, Inc.
501 Race St.
Cincinnati, OH 45444

CASE STUDY 1-1

PR REVIEW CHECKLIST FOR GROUNDS MAINTENANCE REQUIREMENT

ELEMENTS OF A PR	OMISSIONS/DEFICIENCIES
Approvals & Reviews	
Funding	
Quantity	
Description	
Packaging/Marking	
Inspection/Acceptance	
Delivery/Shipment	
Contract Administration	
Special Provisions/Clauses	
Technical Evaluation Factors	<i>THIS IS NOT COVERED IN DEPTH IN THIS COURSE</i>
Sources	
Acquisition Plan	<i>THIS IS NOT COVERED IN THIS COURSE</i>
SIGNATURE	DATE:

CASE STUDY 1-2

PR REVIEW CHECKLIST FOR FIREWORKS DISPLAY REQUIREMENT

ELEMENTS OF A PR	OMISSIONS/DEFICIENCIES
Approvals & Reviews	
Funding	
Quantity	
Description	
Packaging/Marking	
Inspection/Acceptance	
Delivery/Shipment	
Contract Administration	
Special Provisions/Clauses	
Technical Evaluation Factors	<i>THIS IS NOT COVERED IN DEPTH IN THIS COURSE</i>
Sources	
Acquisition Plan	<i>THIS IS NOT COVERED IN THIS COURSE</i>
SIGNATURE	DATE:

CASE STUDY 1-3

PR REVIEW CHECKLIST FOR SECURITY SYSTEMS REQUIREMENT

ELEMENTS OF A PR	OMISSIONS/DEFICIENCIES
Approvals & Reviews	
Funding	
Quantity	
Description	
Packaging/Marking	
Inspection/Acceptance	
Delivery/Shipment	
Contract Administration	
Special Provisions/Clauses	
Technical Evaluation Factors	<i>THIS IS NOT COVERED IN DEPTH IN THIS COURSE</i>
Sources	
Acquisition Plan	<i>THIS IS NOT COVERED IN THIS COURSE</i>
SIGNATURE	DATE:

CASE STUDY NO. 1-4.
Coffee Talk

Contract specialist, Justine Times received a requirement for which there are three recommended sources. That evening over coffee with Ruby-Redd, her neighbor, she mentioned the specifics of the requirement and how excited she was to have been given such a complex high-dollar value procurement. Ruby repeated the same information to her cousin, Tom Tumble. Tom is the vice-president of one of the large firms identified as a source. Tom used that information to have his firm takeover the only known company manufacturing one of the components.

Question 1. What information did Justine divulge that should not have been?

Question 2. Is there anything she could tell her neighbor?

Question 3. How did this information harm the Government?

Question 4. Is there any time you can divulge information before a solicitation has been issued?

CLASS EXERCISES

LESSON 3: MARKET RESEARCH

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Case Study 3-3 The Right Questions for the Right Audience	3-11
Case Study 3-4 Scenario: The Right Technique	3-13
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Case Study 3-1 "Nothing But the Truth, the Whole Truth"

ACQUISITION HISTORY RECORD FOR TV SURVEILLANCE SYSTEM				
Contract No. & Contractor	Date of Award	Quantity	Unit	Award Amount
Q90-1490/Tri-State Unlimited Security Systems Inc.	2-24-90	1	EA	\$160,000
Q89-4309/Tri-State Unlimited Security Systems Inc.	9-15-89	1	EA	\$160,000
Q87-2307/Alarm & Security Equipment Inc.	6-20-87	1	EA	\$155,000

Read the chart above and answer the following questions.

Question 1. What types of information were covered in the acquisition history?

Question 2. Gene used the going rate of the TV surveillance system as a part of his argument (see attached copy of roleplay). Does the acquisition history support that argument?

Question 3 What information would best provide you with the going rates?

Question 4. What information could have helped Pat avoid embarrassment for the specification issue raised by Gene (see attached copy of roleplay)?

Question 5. How do you rate the acquisition history used by Pat?

CASE STUDY 3-1
"NO DOUGH, NO GO"
FUNDS FOR TV SURVEILLANCE SYSTEM
 (Copy of Script used in Roleplay)

Set the stage:

The contract specialist, PAT, must contact the RA, GENE POOLE to inquire about the vast difference in the Government Cost Estimate and the previous award amounts.

Speaker	Script
Contract Specialist	Hello. May I speak with GENE Poole.
RA	This is Mr. Poole speaking.
Contract Specialist	Mr. Poole, this is Pat Rivers calling. I received the memo you sent me today. I've found a new problem with YOUR REQUISITION .
RA	I THOUGHT I WAS THROUGH WITH YOU. WHAT IS IT THIS TIME?
Contract Specialist	In reviewing the acquisition history for this item, there is a significant variance between the current \$84,500 Government Cost Estimate and the actual amount paid for previous procurements The \$84,500 is not enough for me to process this PR. Unless you can come up with another <u>50 to 60 thousand dollars</u> , you can just forget this requirement.

RA

\$50 OR 60 THOUSAND - ARE YOU CRAZY???

You're assuming **I** don't know what the value is for the requirement **I** want. Apparently it is **you** that don't know how much things cost.

Look, I know you are relying on the past three contracts awarded for this office. However, if you would just read the specifications for the past three contracts you would have realized my requirements this time were considerably less. I also checked with another office and found out what the GOING rates are. **DID YOU?**

Unless you can justify your position to me, the \$84,500 available stands and I expect you to continue with my requirement.

Next time, Pat, research the market before you bother me.

Case Study 3-2

Where Do I START?

Directions: Place an X next to the applicable source(s).

1. Which of the following sources would be useful in compiling a **list of companies**?

RESOURCES	MARK
Thomas Register	
Yellow Pages	
Producer Price Index	
Monthly Labor Review	
Consumer Price Index	
Product brochures and promotional literature	

2. Which of the following sources would be useful in identifying **market price trends**?

RESOURCES	MARK
Thomas Register	
Yellow Pages	
Producer Price Index	
Consumer Price Index	
Informational requests for quotations	
Product brochures and promotional literature	
Catalogs of manufacturers, distributors, etc.	

Case Study 3-2 Where Do I START? (Continued)

3. Which of the following sources would be useful in locating and evaluating **product descriptions**?

RESOURCES	MARK
Thomas Register	
Yellow Pages	
Vendor files	
Mandatory and optional schedules	
Informational requests for quotations	
Product brochures and promotional literature	
Catalogs published by manufacturers, distributors, and dealers	
GSA Federal Supply Schedules	
Federal Procurement Data System	

4. Which of the following sources would be useful in identifying **technological improvements**?

RESOURCES	MARK
Trade journals	
Vendor files	
Mandatory and optional schedules	
CPI, PPI	
Informational requests for quotations	
Product brochures and promotional literature	
Catalogs published by manufacturers, distributors, and dealers	
GSA Federal Supply Schedules	
Federal Procurement Data System	

CASE STUDY 3-3

"The Right Questions for the Right Audience"

Directions: Circle the survey your group was assigned and develop questions (other than those in the sample surveys in the TR) your group determines are pertinent to the TV surveillance system **only**, line item 0001 of the Security Systems PR.

Buyer Market Survey

Industry Market Survey

CASE STUDY 3-4

"The Right Technique"

Directions: Read each of the following scenarios and select the techniques by number from Exhibit 3-7 on TR 3-14 & 3-15 (i.e., 1. Investigate the market, 4. Visit potential suppliers, etc.) that best fit the requirement. Also, prepare to explain why you selected each technique. **Base your decision on the scenario; do not make any assumptions.**

1. Neville Wright received a requirement for 100 each modular office buildings. This requirement was a result of a hurricane in their northeast region. Nevill had never procured this requirement. Time is of the essence since the employees have no office to go to.

2. Neville Wright received a requirement for microfilming their procurement files. This requirement comes up every year. Microfilming is considered a better alternative than storing the hard copy of the files. A look at the acquisition histories indicate the same firm has received the contract the last three years. The RA has indicated their performance is only marginally satisfactory.

3. Neville Wright received a requirement for forms cabinet unique in design to their office. Only one source was provided by the RA

4. Neville received a requirement for Debt Collection Services. Until now, the Federal Government was prohibited from contracting for these services. There is no information on file regarding this requirement or the industry.

CASE STUDY 3-5

"The Whole Truth"

DIRECTIONS:

1. Read the market report for TV surveillance system on CE 3-16 to CE 3-19.
2. Read the questions in each sub-category on pages CE 3-20 to CE 3-24 and analyze the market report to determine if the report addresses the sub-categories adequately.
3. After reviewing each question listed under the different sub-categories, circle the response that best evaluates the sub-category overall.
4. Be prepared to defend your selection.

NOTE: The questions are provided as a basis for analyzing the adequacy of the sub-category. You are not required to provide written answers to the individual questions, however, you should consider whether each question was addressed in the market report and how thoroughly it was discussed.

MARKET REPORT

Security Requirements for The Desert Storm Museum

I. Background

A museum is being constructed to commemorate the women and men who served in the Persian Gulf on behalf of our country during the Desert Shield/Storm Operation. The museum will house many artifacts of war and gifts of appreciation from the Saudi Arabia and Kuwait governments. Security measures are to include a television surveillance system and X-ray equipment (as used in airports).

The Television surveillance system will include 5 cameras, 5 monitors, one Video Cassette Recorder and one Master Control. The requirement covers all plant, labor, materials, equipment, tools and transportation necessary to install the Television Surveillance system.

There is only one source for the X-ray equipment, due to its unique requirements. Therefore, the market was not researched for this item.

II. Schedule

The museum is scheduled to open June 27, 1992. Delivery of the equipment is due May 1, 1992. This allows the contractor more than 45 days to install and test the equipment.

III. Potential Suppliers

Two sources were provided on the purchase request by the requiring activity. Both contractors had received a contract within the last two years.

A search was conducted for additional sources using the Thomas Register, local yellow pages, and by contacting one of the regional offices of this agency that had previously procured this equipment. An 18 additional sources were identified. The sources are a mixture of electronic manufacturers and alarm and security companies.

A mailing list has been developed to include all sources identified (see attached source list).

IV. Distinguishing Characteristics

The television cameras, monitors and VCR are considered standard commercial products. The Master Control, however, must be specially built to match the requirements of the buyer. Installation will require licensed electricians and must be closely coordinated. Since this is a security system, dedicated circuits and a generator to back up the electrical source are required. This will allow the system to perform even when there has been a loss of power.

(Continued next page)

V. Market Prices

Prices for the monitors and VCR are based on commercial sales to the general public. Monitors range between \$500 and \$800 and the VCR is approximately \$249. This is based on retail prices. Discounts from the retail price as offered by the manufacturer to their wholesaler and other special customers are 15% to 30% depending upon the volume of business. It can be anticipated a discount of 20% will be obtained since the Federal Government is considered a "special customer."

The anticipated price of the 5 monitors:	\$3,200
1 VCR:	\$ 249
Total	\$3,449

The cameras are more sophisticated than what is normally purchased by individuals for their personal use. The cameras must be able to provide 180 degree horizontal and 90 degree vertical surveillance and shall be low light compensated. Cameras of this type are normally sold directly to security firms and range in price from \$4,500 to \$6,000 depending upon the volume of business. The Government could expect to pay an amount closer to the 6,000 range since there is a requirement for only 5 cameras. A total of \$30,000 for the cameras is considered realistic.

Some firms have leased the equipment when the need is for a short period of time (such as a special showing of an art exhibit on loan to a commercial business as a part of a promotion). The leased equipment, however, is never provided as new under any purchase order.

The Master Control price is based on the number and kinds of cameras and monitors to be provided. A Master Control that includes 3 to 5 of the type of cameras required will cost approximately \$50,000.

All prices include cost of installation.

VI. Trends in Supply and Demand

Sales appear to be steady year round with no recognizable peaks and valleys. Prices appear to decrease in time for the monitor and VCR equipment. This is based on the public demand for these items and the growing number of firms capable of supplying the products at competitive prices. The demand for the cameras is limited to security and security-related firms. The prices appear to remain consistent with the rate of inflation. Based on the unique requirements of the Master Control, an evaluation of current trends could not be made. Market surveys from the electronics firms suggest security firms control the costs associated with the installation, maintenance, repair and contract administration, while security firms indicate electronic firms are responsible for the costs associated with the product itself.

VII. Commercial Terms:

The electronic companies that design and manufacture the products are the prime contractor. The installation is subcontracted to non-manufacturers such as alarm &

Market Research

security companies. A 90 day warranty is standard for the cameras, monitors and VCR. There is no warranty on the Master Control.

(Continued next page)

Installation and testing takes approximately 30 days after the equipment is delivered to the alarm and security company. If any cables are to be hidden within the walls, the electrician must be given access at the time the building is being constructed and before the walls are completed. Since dedicated lines are required for the security systems, coordination with any other electricians for their electrical requirements is essential.

VIII. Concerns About Quality

Installation is the key to good performance.

The electronic equipment is generally free from defects and other problems. Normally if the equipment will malfunction it will be within the first 30 days. The 90 day warranty appears to be sufficient.

The Master Control will also perform satisfactory if the installation has been done properly. Any glitches should be identified and corrected during the testing phase.

IX. Acquisition History:

The prices paid previously by the Government for this equipment ranged from \$155,000 to \$160,000. After careful review it was determined that the increase in price paid by the Government was based on a much larger requirement (a system of 10 cameras and monitors vs. 5 ea for this requirement.)

Also, since the cameras and Master Control were much more sophisticated than what is required under this procurement, exact comparisons of unit prices cannot be made. Reviewing the acquisition histories did indicate the companies that supplied the systems performed satisfactory and delivered and installed the equipment on time. In fact, the system installed in 1987 has not suffered any downtime.

While only two firms have received contracts, adequate competition was received in response to the Request for Proposals. Although several firms responded as a result of the synopsis in the CBD for the prior procurement, they did not submit a proposal. Only the two firms that received a contract responded to all three solicitations.

Negotiations dealt only with delivery terms and prices. Specifications appeared adequate and did not seem to limit any competition. A firm-fixed price contract was awarded all three times.

There were no complaints received or protests filed in regard to the previous procurements.

(Continued next page)

TV Surveillance Systems Mailing List

Mountain West Alarm Supply Co.
P. O. Box 10780
Dept. T
Phoenix, AZ 85064
(602) 263-8831

Hirsh Electronics Corp.
1751 - T Langley Avenue
Irvine, CA 92714
(714) 250-8888, Ext. 97

Whelen Engineering Co., Inc.
Rte 145 Winthrop Rd
Chester, CT 06412-1036
(203) 526-9504

Visi-Con, Inc.
749-T Central Avenue
Deerfield, IL 60015
(312) 948-0230

Faraday, Inc.
803 S. Maumer
Tecumseh, MI 49286
(517) 523-2111, Ext. 117

RACO (Remote Alarms and Controls)
400 62nd St.
Emeryville, CA 94608
1-800-722-6999
415 7658-6713

District Security Services, Inc.
233 -T N. Michigan Avenue
(Industrial and Commercial Security
Services and
Overall Asset Protection Programs)
Chicago, IL

Custom Built Security Monitors
1821 Pennsylvania Ave
Baltimore MD 21217

Metropolitan International Investigation ,
Inc.
201-T Padonia Road, W.
Timonium, MD

Advance Security, Inc.
A Figgie International
2964 Peachtree Road
Atlanta, GA

Globe Security Systems, Inc.
2503 Lombard Street
(Undercover Investigations)
Philadelphia, PA 32100

Sentry Protection Systems Corporation
150 Liverpool Street
Each Boston, MA

A-1 Security Systems
8013 Old Branch Avenue
Clinton, MD 20735

ADT Security Systems
3621 7th Avenue
Charleston, WV 25312

Electronic Equipment Co.
1003 S. Chapel Street
Neward, DE 19702

American Sound and Security
12366 Parklawn Drive
Rockville, MD 20852

Best Security Systems Co, Inc.
Box 767
Millersville, MD 21108

Day and Nite Home Security Inc.
432 N. Front Street
Wheeling WV 26003

CATEGORY A: TYPE OF PRODUCT:

1. Product Characteristics

- A. Is the product a general purpose consumer or commercial item for which major retail and wholesale markets exist?
- B. How is the requirement configured? Can it be separated into several line items for bidding by different sellers?
- C. What features distinguish one deliverable from another?
- D. Are there any unique or restrictive requirements for this product/service?
- E. How often does the product change?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

2. Product Quality

- A. What are the historical repair costs?
- B. What are the maintenance costs?
- C. What is the life expectancy?
- D. Does the product performance exceed what is needed to do the job?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

CATEGORY B: TYPE OF MARKET

1. Competitive Conditions

- A. Are there sufficient sellers for this product?
- B. Are there buyers other than the Government?
- C. Which firms in the market are the most likely to submit offers to a Government solicitation?
- D. Are the contractors likely to subcontract any part of the requirement?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

2. Delivery/Performance Leadtimes?

- A. What are the current distribution channels?
- B. What are current transportation costs (if available and applicable)?
- C. What are the commercial lead times?
- D. Any additional charge for special packing and packaging

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

3. Commercial Terms and Conditions

- A. What type of specifications are used commercially?
- B. What type of contract is generally used in commercial transactions?
- C. What warranty provisions are available commercially?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

CATEGORY C: AGENCY EXPERTISE

1. Purchase Request Estimate

- A. How was the estimate developed?
- B. What assumptions were made?
- C. What information and tools were used?
- D. How did previous estimates compare with prices paid?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

2. Acquisition Histories?

- A. What prices were paid in the past?
- B. How were the historical prices determined fair and reasonable?
- C. How comparable were the historical purchases (specification, timeliness, quantity, type of contract, etc.)
- D. What has been the historical default rate by firms in the market?
- E. What performance problems have typically been encountered?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

3. Published Data

- A. Is the requirement offered to the public via a published document (catalog)?
- B. What is the price of the product or comparable products?
- C. How comparable is the product described in the published source?
- D. Is there more than one price estimate that can be drawn from published sources?

Market Research

CIRCLE ONE:

1. Adequately covered
2. Covered but more information is needed
3. Omitted
4. Not applicable to this requirement

CATEGORY D: TIME OF PURCHASE

1. Patterns and Trends in Supply and Demand

- A. Is there a cyclical pattern to supply and demand?
- B. Will supply capacity keep pace with demand?
- C. Have there been any recent changes in the market impacting on supply and demand?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

2. Pricing strategies

- A. What are the pricing strategies of firms in the market?
- B. Are there any forces that might drive prices in the near future? (strikes, labor shortages, subcontractor bottlenecks, energy shortages, other raw material shortages)
- C. What forces might lead us to expect lower prices in the future (easing demand, easing shortages)?
- D. Are there any evident price trends that would affect this procurement?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

3. Impact of time of purchase on this requirement:

- A. Will our volume justify a lower market price?
- B. Will our volume be so large as to drive the sellers to or beyond full capacity?
- C. Would it be better to stock up now at today's prices?
- D. Would awarding 6 months from now result in lower prices
- E. Would demand be higher or lower at the time of award?

CIRCLE ONE:

- 1. Adequately covered
- 2. Covered but more information is needed
- 3. Omitted
- 4. Not applicable to this requirement

Rate the overall effectiveness of the market report.

CIRCLE ONE:

1. Adequate to proceed with the procurement.
2. More information is needed before proceeding with the procurement.

CLASS EXERCISES

LESSON 2: FUNDING

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FUNDING

Case Study No. 2-1

Where did all the time go?

Justine Times, the Contracting Officer, received a purchase request on May 20, 1991 for 25 lawn mowers. The purchase request included a fund citation as follows:

127.1.S00P0918.10.21.H40.110.

Justine was so excited about her high dollar value procurement that she forgot about this PR and did not complete the procurement until October 16. She issued the contract and signed it without consulting anyone.

Read the above scenario and answer the following questions.

Question 1. In what fiscal year did Justine receive her PR?

Question 2. In what fiscal year did Justine complete the procurement?

Question 3. What was the last day funds could be obligated under the PR?

Question 4. What did Justine do wrong?

FUNDING

Case Study No. 2-2 Last Minute Requests

Justine received a purchase request on September 18, 1991 for 25 lawn mowers with delivery not due until April 1. The PR included a fund citation as follows:

127.1.S00P0925.10.21.H40.110

Justine knows the earliest she can make an award is November 1991.

Read the above scenario and answer the following questions.

Question 1. In what fiscal year did Justine receive the PR?

Question 2. What is the last day funds can be obligated?

Question 3. How does the date identified in Question 2 impact the fund citation?

Question 4. Should Justine accept the PR?

Case Study 2-3 "A Blast from the Past"

In reviewing the files on previous awards for TV surveillance systems, Pat Rivers created the following chart and compared this information to the current request.

ACQUISITION HISTORY RECORD FOR TV SURVEILLANCE SYSTEM				
Contract No. & Contractor	Date of Award	Quantity	Unit	Award Amount
Q90-1490/Tri-State Unlimited Security Systems Inc.	2-24-90	1	EA	\$160,000
Q89-4309/Tri-State Unlimited Security Systems Inc.	9-15-89	1	EA	\$160,000
Q87-2307/Alarm & Security Equipment Inc.	6-20-87	1	EA	\$155,000

Read the chart above and answer the following questions.

Question 1. What amount of funds have been made available for the TV Surveillance System, Line 0001 on the PR?

Question 2. How does that amount compare to the amounts awarded previously?

Question 3. Should you continue to process the PR?

Question 4. What should be your next course of action?

LESSON 4

SPECIFICATIONS AND SOWS

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Case Study 4-1

Looking for Mr. Goodspect

Scenario: Justine Times received six PRs for which she must identify whether a specification exists.

Directions:

Use the GSA Index of Federal Specifications, Standards, and Commercial Item Descriptions (**Appendix A**) and Exhibit 4-1 on TR page 4-6 to answer the following for each requirement:

- 1. Does a specification exist?**
- 2. What kind of specification is it?**
- 3. How many specifications did you find?**
- 4. Does the specification meet your need?**

The six PRs are for the following requirements:

1. Air Conditioner for use in the mailroom

2. USA flag for use in the auditorium

Case Study 4-1
Looking for Mr. Goodspec
(Continued)

3. Battery operated smoke alarm detectors for use in the officers' home on base.
4. Testing of Sleeping Bag Cloths using the Tablet Method for flammability
5. W-A-00450A (No description)
6. Cameras, Television, Monochrome, Closed Circuit Fed Specification W-C-1422B/GEN

Specifications and SOWs

NOTE: THIS IS AN ABBREVIATED VERSION OF THE CID.

A-A-2081B
June 1, 1989
Superseding
A-A-2081A
March 15, 1984

COMMERCIAL ITEM DESCRIPTION

CREDENZAS, OFFICE (TRADITIONAL STYLE)

General Services Administration has authorized the use of this Commercial Item Description in preference to Interim Federal Specification AA-0-00249.

SALIENT CHARACTERISTICS These characteristics describe concisely the essential physical and functional/performance characteristics of the commercially available item.

DESIGN. The credenzas shall be traditional style designed for heavy duty office use.

STYLES:

Style A - Double sliding door section with adjustable shelf. Minimum overall dimensions 29"W x 18"D x 28 1/2"H.

Style B - Two pedestal sections with a double sliding door section between. Each pedestal section shall have 1 storage drawer over a file drawer and the sliding door section shall have an adjustable shelf. Minimum of one lock located on either a file drawer or sliding doors. Minimum overall dimensions 59"W x 18"D x 28 1/2"H.

GENERAL CONSTRUCTION

Tops. Steel construction reinforced with formations extending the full length of the top for maximum rigidity. Top edges shall have a binding strip and shall be covered with decorative laminate plastic. Alternatively, the top may be particleboard with high pressure laminate plastic face and backing sheet to produce a balanced sandwich construction. A protective edging shall be around the entire top and the color shall be gray, similar to the gray enamel finish (self-edging, not allowed). Overall thickness shall be 1" minimum.

Drawers. The drawers shall have stops to prevent accidental removal but allow removal without the use of tools. The storage drawer shall have a minimum of one partition.

Drawer and door pulls. Polished finish chrome plate on steel, die-cast zinc, brass or bronze; polished stainless steel or polished anodized aluminum.

Locks. The locks shall be of the disk or pin tumbler type, having not less than four disks or pin tumblers. No one key shall open more than the lock on one unit up to a minimum of 125 units consecutively produced. Duplicate keys shall be furnished for each lock.

Specifications and SOWs

Finish. The finish shall be baked enamel. The color shall match Fed. Std. No. 595 gray (26134). Alternatively, the manufacturer may provide his equivalent commercial baked enamel gray finish subject to contracting officer's approval.

Case Study 4-2

"Which Type is It?"

Directions:

1. Using the CID for the credenza, locate one example of design, one example of performance, and one example of function type descriptions in the following three paragraphs of the CID:

Design, Drawers, Locks

2. Write the statement, and/or the phrase below that describe design, function, and performance descriptions.

Design:

Performance:

Function:

Specifications and SOWs

Case Study 4-3

Words can Make a Difference!!

Directions: Read the phrases and sentences and identify the **only** acceptable statement.

1. To the satisfaction of the Contracting Officer
2. Contractor may be required to furnish manuals.
3. All reasonable requests of the Contracting Officer shall be complied with.
4. In accordance with best commercial practice
5. Workmanship shall be of the highest quality
6. Installed in a neat and workmanlike manner
7. The contractor shall use only good materials.
8. Acceptance will be made only after the contractor has carefully performed the duties outlined in the statement of work.
9. The finished product should have pleasing lines when visually inspected.
10. The contractor is to provide manuals and/or floppy discs.
11. The leather shall be skillfully fitted over the frame.
12. The guides shall promote a smooth quiet operation by preventing any metal to metal contact between suspension members.
13. Contractor is to fabricate the requirement in accordance with attached drawings only.
14. Contractor is to scan the documents and implement the requirements.

Specifications and SOWs

Case Study 4-4

TV Surveillance System Statement of Work

Directions: Identify problem sentences and phrases in the statement of work for the TV surveillance system and:

1. List paragraph number and
 2. Rewrite the problem sentences and/or phrases below
-

Specifications and SOWs

(OPTIONAL)
Case Study 4-5
Fireworks

Directions: Use the fireworks statement of work and the market report to:

1. Identify omissions, conflicts and inconsistencies.
2. Compare the fireworks SOW to the Market Report.
3. Compare the fireworks SOW and Market Report to the related elements of the fireworks PR

Identify all problem areas below

Specifications and SOWs

REQUISITION FOR EQUIPMENT, SUPPLIES, OR SERVICES						1. PAGE OF PAGES	
2. REQUISITION NUMBER F34594		3. STOCKROOM CONTROL NO.		4. STOCKROOM CODE NO.		5. DATE PREPARED OCTOBER 15, 1991	
6. JOB NUMBER							
7. TO (Stockroom - name and location) Director of Contracting Federal Dept. of Administrative Services 552 Landing Blvd. Washington DC 20002				8. FROM (Requisitioning point - name and location) Forest Hill Federal Management Office Headquarters, Office of Parks & Recreation 2426 Carnation St. Washington DC 20400			
9. ALLOTMENT AND EXPENSE ACCOUNTS CHARGEABLE 127.2.SOOP0920.10.21.H40				10. SIGNATURE OF APPROVING OFFICER			
11. FOR INFORMATION CALL (name, telephone number, and extension) Steven Wonder (110) 370-5100 Ext. 15				12. TITLE OF APPROVING OFFICER Executive Assistant			
FORM OR STOCK NUMBER (13)	DESCRIPTION OF ARTICLES OR SERVICES	QUAN-TITY (15)	UNIT (16)	UNIT PRICE (17)	AMOUNT (18)		QUANTITY RECEIVED (19)
0001	Fireworks display for Desert Storm Museum dedication ceremony In accordance with Attached Statement of Work Recommended Sources: Light up the Night P.O. Box 874 Wilmington, DE 19805 Industrial Light Shows 1714 7th Avenue Waterbury CT 06101	1	ea	75,000	75,000	00	
20. DELIVER TO (Give complete address, including ZIP Code) Desert Storm Museum 3115 Keystone Dr. Washington DC 20040 ATTN: J. Gallo Phone: (110) 485-1234		TOTAL AMOUNT ➡			75,000	00	
22. FILLED BY		23. PACKED BY		24. CHECKED BY			
25. BILL OF LADING NUMBER				26. DATE SHIPPED			
27. THE ABOVE ITEMS OR SERVICES WERE RECEIVED EXCEPT AS INDICATED ABOVE.							
SIGNATURE		TITLE				DATE	
NOTE: Acquisition of nonexpendable items are to be fully justified on face of requisition.							

Specifications and SOWs

**FIREWORKS DISPLAY FOR THE
DEDICATION CEREMONY OF THE DESERT STORM MUSEUM
STATEMENT OF WORK**

PART 1: SCOPE/BACKGROUND/OBJECTIVE

1.1 Scope of Work

Provide labor, material, and equipment for presentation of an innovative and attractive aerial fireworks display.

1.2 Background

A museum to commemorate the women and men who served in the Persian Gulf on behalf of our country during the Desert Shield/Storm operations is scheduled to be opened on June 27, 1992. A dedication ceremony of the museum is planned for opening day and will conclude with a 30-35 minute fireworks display.

1.3 Objective

Program objective shall be to create a spectacular, continuous-fire aerial display visible to an audience viewing from many area vantage points not immediately adjacent to the discharge site. To achieve this objective, the contractor is urged to include as many high bursting pieces as possible, allowing for appropriate layering and balance of the overall program with no perceptible breaks or gaps in the display.

PART 2: CONTRACTOR TASKS

The following general parameters are provided for accomplishment of the objective.

2.1. Length of Display: 30-35 minutes continuous firing.

2.2 Music: Music/narration tape shall be provided 30 days before the scheduled date of completion by contractor and shall be of an upbeat and patriotic theme.

2.3 Fireworks

2.3.1 Type and Quantity: Total display shall include approximately 3,000-3,500 individual shells. These are to be regarded as guidelines, however, innovation and creativity on the part of the contractor, contributing to the enhancement of the program, is encouraged. Proposal shall focus on aerial display only; ground displays and set pieces shall not be considered, and no parachute shells of any type shall be allowed. Suggested numbers of shells are provided as follows:

Shell Size

Approximate Number

Specifications and SOWs

10" - 12" shells	90-100
6" - 8" shells	1800-2100
3" - 6" salutes	450-530
4" - 5" shells and candles	600-700
3" shells - Finale only	60-70

**FIREWORKS DISPLAY
STATEMENT OF WORK
(Continued)**

2.3.2 Program design: Shells shall be distributed within the following segments:

- Opening: The first 1 1/2 - 2 minutes will be televised live so the opening shall include a selection of showy, high-bursting pieces. Approximately 3 minutes in length.
- Body: It is recommended that the body of the program contain approximately 2000 individual pieces. Approximately 25 minutes in length.
- Finale: Since the final impression is generally the lasting impression in a fireworks program, it is recommended that that the offeror place a good deal of emphasis on the final portion of the proposal. Approximately 4 minutes in length.

2.4 Set-up, Cleanup and Take down

2.4.1 The contractor shall be responsible for the complete set-up and cleanup of the display and supplying all necessary materials.

2.4.2 The contractor shall furnish qualified operators for set-up, launch and take down and shall abide by all Federal, state, local and Office of Parks & Recreation regulations which apply to handling pyrotechnics.

2.4.3 The contractor shall be responsible for cleanup of the safety zone to include: cleanup of shell fragments, bits of fusing, and any hazardous material; gathering sand from the discharge area into piles for removal by Office of Parks & Recreation personnel; gathering any other trash and debris generated by the contractor's personnel in appropriate trash containers.

2.5. Schedule

2.5.1 The fireworks display is scheduled to commence at 9:15 pm unless modified in writing by the Contracting Officer's Representative (COR) at the launch site.

2.5.2 In the event of inclement weather, the display will be rescheduled for June 28, 1992. The decision to postpone displays will be made by the COR.

2.5.3 Live loads shall not be brought onto the grounds until June 25, 1992.

2.6 Government-Furnished Items

1. Safety fence/rope
2. Sand (maximum 30 tons; requirements exceeding 30 tons will be the responsibility of the contractor. Provide COR with amount required by May 4, 1991).

Specifications and SOWs

3. Supplemental site security when live loads are moved onto the firing site.
4. Telephone on site (local calling service only).

**FIREWORKS DISPLAY
STATEMENT OF WORK
(Continued)**

PART 3: CONTRACT END ITEMS

3.1. Inspection and Acceptance

3.1.1 Completion of Physical Set-up: To allow time for adjustments to the set-up if required, all the mortar tubes shall be set-up, fastened together and any foundation sand in place by 11:00 am on June 26, 1992. An on-site inspection will be performed at that time by COR.

3.1.2 Display for inspection: The entire display shall be loaded, fused, covered and ready to shoot by 4:00 pm on June 27, 1992. A comprehensive inventory and inspection will be performed at that time.

3.1.3 Shell Failure Rate: The Government will not allow a shell failure rate exceeding 1/2 of 1 percent. Deductions will be made at the contract price for any shell failure in excess of this allowance.

3.1.4 Substitutions shall not be made after award of contract unless approved by contracting officer 30 days prior to June 27, 1992. Failure to provide exact brand, size, and quantity of shell as submitted in final proposal will result in reduction in payment.

3.1.5 Variation from Proposal: Deficiencies greater than 1 percent in the number, quality, and/or sizes of shells furnished which are not in accordance with the submitted and accepted proposal will result in nonpayment for said shells at the contract price plus require assessment of liquidated damages in the amount of \$5,000.00 which will be deducted from the final contract payment.

3.2 Delivery/Performance Schedule

May 27, 1992:	Last day to approve substitutions
May 27, 1992:	Music tape is due for approval
June 25, 1992:	Fireworks may be delivered no sooner than this date.
June 26, 1992:	11:00 a.m. -Motor tubes, sandm and any other set up requirements must be ready for inspection
June 27, 1992:	4:00 p.m. - The entire display shall be loaded, fused, covered and ready to shoot
	9:15-9:40: Fireworks display
June 28, 1992	4:00 p.m - Cleanup to be completed

3.3 Contract Administration:

A Contracting Officer's Representative (COR) will be assigned within 10 days after award of contract. The contractor will receive notification identifying the representative's name,

Specifications and SOWs

title, location, telephone number and what the COR is authorized to do. At a minimum, the COR will be responsible for inspection and acceptance.

MARKET REPORT

Fireworks

I. Background

A museum will be erected to commemorate the women and men who served in the Persian Gulf on behalf of our country during the Desert Shield/Storm Operation. A dedication ceremony for the museum is planned and will conclude with a 30 minute fireworks display.

The Contractor will be required to provide labor, material, and equipment for presentation of an innovative and attractive aerial fireworks display. Program objective shall be to create a spectacular, musical continuous-fire aerial display visible to an audience viewing from many area vantage points not immediately adjacent to the discharge site. To achieve this objective, the contractor is urged to include as many high bursting pieces as possible, allowing for appropriate layering and balance of the overall program with no perceptible breaks or gaps in the display.

II. Schedule

The fireworks display is scheduled to commence at 9:15 pm on June 27, 1992 unless modified in writing by the Contracting Officer's Representative (COR) at the launch/discharge site.

In the event of inclement weather, the display will be rescheduled for June 28, 1992. The decision to postpone the display will be made by the COR.

The contractor will be required to allow time for adjustments to the set-up if required. All the mortar tubes shall be set-up, fastened together and any foundation sand in place by 11:00 am on June 26, 1992.

III. Potential Suppliers

The attached mailing list was developed using sources identified in the Thomas Register, Donnally Procurement Directory and by contacting the National Park Service in Washington, D.C. and Disneyworld, Florida.

Other display sources were identified by the following fireworks manufacturers:

Illinois Fireworks Co., Inc.
P.O. Box 792
Danville, IL

New Jersey Fireworks Mfg. Co.
P.O. Box 118
Vineland, NJ

Ohio Fireworks Manufacturing Company
Rock Hill Place
Bellaire, OH

Burnett Fireworks Co., Inc.
3502 - T N. Washington St.
P.O. Box 1743
Enid, OK

Vitale Fireworks Manufacturer Company
P. O. Box 3
New Castle, PA

Elkton Sparkler Co Inc./M/D
P.O. Box F
North East, MD 21901

Specifications and SOWs

IV. Distinguishing Characteristics

Proposal shall focus on aerial display only; ground displays and set pieces shall not be considered, and no parachute shells of any type shall be allowed. The fireworks display shall include approximately 3,000-3,500 individual shells. Suggested numbers of shells are provided as follows. (These are to be regarded as guidelines, however, innovation and creativity on the part of the contractor, contributing to the enhancement of the program, is encouraged.)

Shell Size	Approximate Number
10" - 12" shells	90-100
6" - 8" shells	1800-2100
3" - 6" salutes	450-530
4" - 5" shells and candles	600-700
3" shells - Finale only	60-70

V. Market Prices

\$75,000 was allocated on the PR for this requirement. A telephone survey of prospective offerors revealed prices for a 30-35 minute display ranged from \$62,000 to \$83,000. The prices paid by the National Park Service increased approximately 6% annually for the last three years July 4 ceremonies were as follows:

July 4, 1989	\$64,000
July 4, 1990	\$68,000
July 4, 1991	\$72,800

The fireworks display to be used for the dedication ceremony will be similar in scope and length of time. Therefore, the \$75,000 is considered reasonable when compared to current market prices.

VI. Trends in Supply and Demand

Prices appear to be most competitive during the July 4 time period. Unfortunately, this is the peak period and most companies have been booked a year in advance. The source list developed includes all firms that have indicated an interest in responding to the requirement.

The shells have been improved to lower the risk of injury. Qualified operators are required to take a safety course twice annually for which they receive a certificate for successful completion.

VII. Commercial Terms:

Most companies manufacture, import and distribute fireworks and the majority of sales have been on a firm fixed price basis. The companies provide insurance and furnish a performance bond equal to 100% of the contract price.

Proper storage of live loads and overall safety in conducting fireworks displays must be in accordance with the Fireworks Safety Act of 1988 and the National Fire Protection Association Standard 1123-1982, respectively.

Substitutions are not usually made unless approved by the customer at least 30 days prior to the date of the fireworks display. Failure to provide exact brand, size, and quantity of shell as submitted in final proposal will result in reduction in payment.

Deficiencies greater than 1 percent in the number, quality, and/or sizes of shells furnished usually result in nonpayment for said shells at the contract price plus assessment of liquidated damages in a specified amount which will be deducted from the final contract payment.

The contractor is responsible for the complete set-up and cleanup of the display and supplying all necessary materials. The contractor will furnish qualified operators for set-up, launch and take down and abide by all Federal, state, local and Office of Parks & Recreation regulations which apply to handling pyrotechnics.

The contractor is responsible for cleanup of the launch/discharge site to include: cleanup of shell fragments, bits of fusing, and any hazardous material; gathering sand from the discharge area into piles for proper removal by the customer.

The customer normally furnishes:

1. Safety fence/rope
2. Sand (maximum 30 tons; requirements exceeding 30 tons are the responsibility of the contractor)
3. Supplemental site security when live loads are moved onto the firing site
4. Telephone on site (local calling service only)

VIII. Concerns About Quality

The improved shells are being used by all vendors in accordance with the Fireworks Safety Act of 1988. There are fewer accidents at the larger, controlled fireworks displays since the passage of this law. However, 95% of fireworks related accidents over the past five years happened to inexperienced individuals (children and unqualified, untrained adult consumers). Qualified operators are essential in this business. Therefore, companies have a responsibility to provide adequate training programs and are required by law to provide safety training courses.

The shells are tested by a performance detector sensor. The shells that do not meet the minimum performance standard are disposed of in accordance with company policy.

IX. Acquisition History:

Specifications and SOWs

There are no previous procurements for fireworks displays.

Fireworks Source List

Atlas Display Fireworks
15-T Hamilton CT.
P.O. Box 371
Jaffrey, NH

Extravaganza, Inc.
191 Halethorpe Farms Rd.
Halethorpe Va 21227

Bursting Light Display
1101 Southlawn Avenue
Dasboro, DE 19939

Creative Fireworks Shows
5606-B General Washington Drive
Alexandria, VA 22306

Case Study 4-5
(Continued)
Fireworks Statement of Work

Directions:

Identify problem sentences and phrases in the statement of work for the fireworks requirement as follows:

1. List paragraph number,
 2. Write the problem phrase, and
 3. Explain why this is a problem
-

CLASS EXERCISES

LESSON 5: SERVICES

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Services

Case Study 5-1

Personal or Nonpersonal?

Directions:

1. Underline the phrases or terms that make this requirement a **personal** service.
2. Identify which of the six factors below apply.
3. Rewrite the requirement as a **nonpersonal** service.

PERSONAL:

A requirement for 25 guards is needed to provide security service at the Federal Building, 111 West End Street on an ongoing basis. The 25 guards will report to the Federal Officer Security Chief in the Security Office in Room 10. There the guards will be given their uniforms, walkie talkies, security equipment, and revolvers. Assignments will be made by the Federal Officer Security Chief. Each guard is to perform the functions as required by the assignment. At the end of each day, the guard will receive his daily performance evaluation. If a positive evaluation was made, the guard may return the next day for another assignment.

THESE ARE THE 6 FACTORS

1. Performance on site
2. Principle tools and equipment furnished by the Government.
3. Services are in furtherance of assigned function or mission.
4. Civil service personnel are performing comparable services.
5. The service will be needed beyond one year.
6. Requires Government direction, directly or indirectly

NONPERSONAL:

Services

Case Study 5-2: "Advise and Consent"

Directions: Identify the requirements in the chart below that could be considered as advisory and assistance services by citing the applicable Factor Number in Column 2. If not an advisory and assistance service, write N/A in Column 2. The factors are provided below.

Determining Factors for Advisory and Assistance Services

1. Obtain outside points of view to avoid too limited judgment on critical issues;
2. Obtain advice regarding developments in industry, university, or foundation research;
3. Obtain the opinions, special knowledge or skills of noted experts;
4. Enhance the understanding of, and develop alternative solutions to complex issues;
5. Support and improve the operation of organizations;
6. Ensure the more efficient or effective operation of managerial or hardware systems.

N/A Not advisory and assistance service

Use TR pg. 5-11 to help you make the determinations.

Requirements	No.
ADP telecommunications	
On site report typing	
Preaward survey	
Payroll	
Electrical/mechanical training materials	
Computer software	
Study on the efficiency of management	

Services

Operation of gift shop	
------------------------	--

Case Study 5-3: "At Your Service"

Directions: Place an X in the columns that you think apply to the requirement.

Requirement	Supply	Service	Personal	Non-personal	A & A
Grounds maintenance					
Credenza					
X-ray inspection equipment.					
TV surveillance system					
Fireworks Display					

Case Study 5-4 "Not My Act"

Directions: The SCA does not apply to any of these services. Give the reason why it does not apply.

1. Moving & storage of household goods from Texas to Arizona

Answer: _____

2. Professional Healthcare Personnel (doctors, nurses, and surgeons)

Answer: _____

3. Remodel the U.S. Marine barracks to accommodate men & women

Answer: _____

4. Procurement Planning Instructor

Answer: _____

5. Telegraph Services

Answer: _____

6. Chief Executive Officer

Answer: _____

7. Mapping Services for rebuilt Kuwait to be performed outside of the U.S

Answer: _____

Case Study 5-5 "Carpet Fresh"

Directions: As you read the story, fill in the missing words. You will need to use the Text Reference, pgs. 5-17 through 5-20.

Justine Times is processing a requirement for carpet cleaning services for her agency to continue through the next fiscal year. The current contractor is Herman Carpet Cleaning Co., 349 8th St., Washington, DC 20019. The only thing she knows about carpet cleaning companies is that her Uncle Lou has been in this business all of his life.

The first thing Justine must do is to determine whether a _____ exists. After reviewing the current contract, Justine learns that a _____ exists and that she must notify both the _____ and the _____. within _____ days. In the notification, Justine must include all _____ dates and asks if there are any _____ to the _____ since the last contract.

Justine receives a response to the notification that the _____ has increased to \$8.75 and the carpet cleaner is the only _____ classification identified. The notification indicates the \$8.75 was negotiated with Carpet Cleaners and Carpet Layers Union Local 172, 1600 Louisiana Ave., Washington, DC 20022.

Justine now has to determine the _____ of carpet cleaners needed to perform the service. The PR indicates 6 floors in one building that are carpeted that need cleaning. Justine contacted the _____ and was told 25 are needed.

Justine makes a trip to the _____ office to obtain the _____ and _____ that would be paid to Government employees if they were to perform this service. The response she received was WG-2, Step 2, \$8.25.

Case Study 5-5 "Carpet Fresh" (Continued)

Justine obtains a copy of the current contractor's _____ from the ACO who is administering the current contract. The ACO provided a copy of the one attached to the current wage determination number A 36222.

Justine contacts the RA to find out the _____ of the building where the services are to be _____. The RA's response was 3115 Keystone Drive, Washington, DC 20040.

On November 15, 1991 Justine compiles all this information on a _____. It must be submitted within _____ to _____. to the _____ prior to issuance of solicitation

Using the information in this story, complete the following forms shown on pages CE 5-17 and 5-19.

Services

STANDARD FORM 98 REV. FEB 1973 U.S. DEPT OF LABOR EMPLOYMENT STANDARDS ADMINISTRATION	NOTICE OF INTENTION TO MAKE A SERVICE CONTRACT AND RESPONSE TO NOTICE <i>(See Instructions on Reverse)</i>	1. NOTICE NO. A XXXXXXXX	
MAIL TO: Administrator Wage and Hour Division U.S. Department of Labor Washington, D.C. 20210	2. Estimated solicitation date (use numerals)		
	Month	Day	Year
	3. Estimated date bids or proposals to be opened or negotiations begun (use numerals)		
	Month	Day	Year
	4. Date contract performance to begin (use numerals)		
Month	Day	Year	
5. PLACE(S) OF PERFORMANCE		6. SERVICES TO BE PERFORMED (<i>describe</i>)	
7. INFORMATION ABOUT PERFORMANCE			
A. Services now performed by a contractor	B. Services now performed by Federal employees	C. Services not presently being performed	
8. IF BOX A IN ITEM 7 IS MARKED, COMPLETE ITEM 8 AS APPLICABLE			
a. Name and address of incumbent contractor		b. Number(s) of any wage determination(s) in incumbent's contract	
c. Name(s) of union(s) if services are being performed under collective bargaining agreement(s). <i>Important:</i> Attach copies of current applicable collective bargaining agreements		RESPONSE TO NOTICE <i>(by Department of Labor)</i> A. The attached wage determination(s) listed below apply to procurement. _____ _____ B. As of this date, no wage determination applicable to the specified locality and classes of employees is in effect C. From information supplied, the Service Contract Act does not apply (<i>see attached explanation</i>) D. Notice returned for additional information (<i>see attached explanation</i>) Signed: _____ <div style="text-align: right;">(U.S. Department of Labor)</div> _____ <div style="text-align: right;">(Date)</div>	
9. OFFICIAL SUBMITTING NOTICE			
SIGNED:		DATE	
<i>Justine Times</i>		11/15/91	
TYPE OR PRINT NAME		TELEPHONE NO.	
Justine Times, Contract Specialist		(202)555-1298	
10. TYPE OR PRINT NAME AND TITLE OF PERSON TO WHOM RESPONSE IS TO BE SENT AND NAME AND ADDRESS OF DEPARTMENT OR AGENCY, BUREAU, DIVISION, ETC.			
DIRECTOR OF CONTRACTING FEDERAL DEPT. OF ADMINISTRATIVE SERVICES 552 LANDING BLVD. WASHINGTON DC 20002 Attn: Justine Times, Contract Specialist			

Services

[illegible]

CLASS EXERCISES

LESSON 6: SOURCE LISTS

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Open Book Assignment	6-11

Source Lists

Case Study 6-1
"Name That Source"

Column No. 1

Column No. 2

1. _____	_____
2. _____	_____
3. _____	_____
4. _____	_____
5. _____	_____
6. _____	_____
7. _____	_____
8. _____	_____
9. _____	_____
10. _____	_____

Source Lists

CASE STUDY 6-2

"Check Me Out"

Pat Rivers has completed her review of all the required sources for the fireworks display. She did not find any required sources that would be able to provide this requirement.

Pat Rivers decided not to check required sources for the X-Ray equipment since this requirement was sole source and a justification was being submitted by the requiring activity.

Only the grounds maintenance requirement, the TV surveillance system, and the credenza remain to be checked. Some sources had been considered and discounted. Pat Rivers put together a package of the remaining required sources for review as follows:

1. The Procurement List
2. Schedule of Products made in Federal Penal and Correctional Institutions
3. Excerpts from the GSA Supply Catalog
4. Federal Supply Schedules

Directions: By using **Appendix B** in your CE book, complete the questions that follow.

1. Is/Are there required source(s) established for the requirements?

Requirement	Yes/No	Required Source(s)
Grounds Maintenance		
Credenza		
Surveillance equipment		

2. If there is more than one source, which source must you order from?

Requirement	Number of Sources	Priority
Grounds Maintenance		
Credenza		

Source Lists

Surveillance equipment		
------------------------	--	--

CASE STUDY 6-3

"The List"

Pat Rivers has developed her mailing lists to use when soliciting for the fireworks display and the TV surveillance system. Pat did not develop a list for the X-Ray equipment since this requirement is sole source. Pat submitted her mailing lists to the contracting officer for approval.

Pat submitted her mailing lists with her PR files (including market reports) to the contracting officer for approval.

Directions:

Acting as the contracting officer, compare the PRs and market reports to the mailing lists and identify the problems you find. Write the problems in the appropriate column on the last page of this case study.

Fireworks Source List

Atlas Display Fireworks
15-T Hamilton CT.
P.O. Box 371
Jaffrey, NH

Extravaganza, Inc.
191 Halethorpe Farms Rd.
Halethorpe Va 21227

Bursting Light Display
1101 Southlawn Avenue
Dasboro, DE 19939

Creative Fireworks Shows
5606-B General Washington Drive
Alexandria, VA 22306

Show Stoppers
1543 E. Church Street
Frederick MD 21701

Professional Displays
P.O. Box 368
Nitro WV 25143

American Images
2161 Webb Street
Bellaire OH

Show of Shows
8-D Music Fair Rd
Hagerstown MD 21740

TV Surveillance Systems

Mountain West Alarm Supply Co.
P. O. Box 10780
Dept. T
Phoenix, AZ 85064
(602) 263-8831

Hirsh Electronics Corp.
1751 - T Langley Avenue
Irvine, CA 92714
(714) 250-8888, Ext. 97

Whelen Engineering Co., Inc.
Rte 145 Winthrop Rd
Chester, CT 06412-1036
(203) 526-9504

Visi-Con, Inc.
749-T Central Avenue
Deerfield, IL 60015
(312) 948-0230

Faraday, Inc.
803 S. Maumer
Tecumseh, MI 49286
(517) 523-2111, Ext. 117

RACO (Remote Alarms and Controls)
400 62nd St.
Emeryville, CA 94608
1-800-722-6999
415 7658-6713

District Security Services, Inc.
233 -T N. Michigan Avenue
(Industrial and Commercaill Security
Services and
Overall Asset Protection Programs)
Chicago, IL

Custom Built Security Monitors
1821 Pennsylvania Ave
Baltimore MD 21217

Metropolitan International Investigation ,
Inc.
201-T Padonia Road, W.
Timonium, MD

Advance Security, Inc.
A Figgie International
2964 Peachtree Road
Atlanta, GA

Globe Security Systems, Inc.
2503 Lombard Street
(Undercover Investigations)
Philadelphia, PA 32100

Sentry Protection Systems Corporation
150 Liverpool Street
Each Boston, MA

A-1 Security Systems
8013 Old Branch Avenue
Clinton, MD 20735

ADT Security Systems
3621 7th Avenue
Charleston, WV 25312

Electronic Equipment Co.
1003 S. Chapel Street
Neward, DE 19702

American Sound and Security
12366 Parklawn Drive
Rockville, MD 20852

Best Security Systems Co, Inc.
Box 767
Millersville, MD 21108

Day and Nite Home Security Inc.
432 N. Front Street
Wheeling WV 26003

Source Lists

Source Lists Review

Directions: Write the problems in the appropriate column.

Fireworks	TV Surveillance Systems

Source Lists

OPEN BOOK ASSIGNMENT
Instructions

1. You are to complete the Open Book Assignment for Lessons 7-10.
2. Read the entire chapters carefully before completing this assignment. You may use the TR to answer the questions. Answer each question.
3. This assignment will be collected first thing in the morning.

NAME _____

OPEN BOOK ASSIGNMENT
Chapter 7

No.	Question	Answer
1.	Economically disadvantaged individuals are people whose ability to compete in the free enterprise system has been impaired due to diminished capital and credit opportunities.	True or False.
2.	What is a set-aside?	Answer
3.	The basic rule governing _____ is the "rule of two." Under this rule, the entire amount of an individual acquisition is set-aside if you determine there is a reasonable expectation that: ¥offers will be obtained from at least two responsible small business concerns, and that ¥awards will be made at fair market prices.	Fill in the blank. _____
4.	Define class set-aside.	Answer:

Chapter 7

No.	Question	Answer
5.	What must you do if you decide not to set-aside a procurement?	Answer:
6.	What is the 8(a) program designed to do?	Answer:
7.	8(a) contractors are only capable of filling requirements for spare parts.	True or False.
8.	Which small business and/or labor surplus area firms should be considered for your set-aside determination?	Answer:
9.	_____ are published by the Office of Management and Budget and are determined by the type of items or services being solicited.	Fill in the blank. _____

Chapter 8

No.	Question	Answer
1.	Are there any special documents required when citing one of the seven authorities for other than full and open competition?	Answer:
2.	Under what type of conditions would you consider full and open competition after the exclusion of sources?	Answer:
3.	_____ means a contract action that is entered into or proposed to be entered into by an agency after soliciting and negotiating with only one source.	Fill in the blank: _____
4.	Why would you synopsise a requirement that has been authorized for other than full and open competition procedures.	Answer:
5.	The appropriate approving official is determined by the:	Fill in the blank: 1. _____ 2. _____

Chapter 8

No.	Question	Answer
6.	What is the difference between J&A and D&F?	Answer:
7.	A justification may be released to the public upon request.	True or False.
8.	Identify which one of the seven authorities apply to the following situations: ¥Strategic Defense Initiative ¥Solar Energy ¥Agency specific procurements	Answer:
9.	What should you do if you discover the recommendation has not been adequately justified or if you locate additional responsible sources?	Answer:
10.	<u>Actions to Increase Competition</u> is included in the format for D&Fs.	True or False.
11.	Which authority can be prepared and approved after award, and why?	Answer:

Chapter 9

No.	Question	Answer
1.	What are three examples of requirements that do not lend themselves to leasing?	Answer:
2.	When requested by an agency, OMB will assist in lease or purchase decisions .	True or False:
3.	What is the difference between purchase and lease?	Answer:
4.	What type of requirements lend themselves to leasing?	Answer:
5.	Should a product that is to be used in a secure area that is totally restricted to Government employees <u>only</u> be leased or purchased?	Answer:
6.	What resources can you use to help you make the decision to lease or purchase?	Answer:

Chapter 9

No.	Question	Answer
7.	<p>The Government leases the equipment and at a specified period(s) in the contract, must determine whether to purchase the equipment or return it to the contractor. Generally, the purchase price is reduced by subtracting a predetermined amount already paid as a part of the lease. This describes which one of the following leasing plans:</p> <ul style="list-style-type: none"> a. Straight lease b. Lease with Option to Purchase c. Lease to Ownership d. Lease to Buyout 	Answer:

Chapter 10

No.	Question	Answer
1.	What is required by the Buy American Act?	Answer:
2..	What are evaluation factors designed to do?	Answer:

Chapter 10

No.	Question	Answer
3.	What are five examples of technical evaluation factors?	Answer: <hr/> <hr/> <hr/> <hr/> <hr/>
4.	What is the purpose of price related factors?	Answer:
5.	Why are guidelines and procedures established?	Answer:
6.	<hr/> provides for the purchase of products produced in designated countries.	Fill in the Blank <hr/>

Chapter 10

No.	Question	Answer
7.	<p>You can encourage small business participation in a procurement by:</p> <p>¥Dividing proposed acquisitions of supplies and services into reasonably small lots (not less than economic production runs) to permit offers on quantities less than the total requirement.</p> <p>¥Planning acquisitions such that, if practical, more than one small business concern may perform the work, if it exceeds the amount for which a surety may be guaranteed by SBA against loss.</p>	True or False
8.	What are the three general categories for determining the method of award?	Answer: <hr/> <hr/> <hr/>
9.	Price related factors are added to the contract price.	True or False.
10.	When is it best to use a partial set-aside award?	Answer:

Chapter 10

No.	Question	Answer
11.	Which one of the problems may force cancellation of the solicitation? a. Front-end loading b. Unbalanced offers c. Inaccurate quantity estimates d. Back-end loading	Answer:
12.	When are technical evaluation factors used?	Answer:

CLASS EXERCISES

LESSON 7: SET-ASIDES

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Set-asides and 8(a) Program

CASE STUDY 7-1

"Gathering Statistics"

Pat Rivers corrected her mailing list as required in Lesson 6. Pat must now make the decision whether to set-aside the procurements for the TV surveillance system and fireworks.

Using the SIC Manual, Pat identified the SIC codes for the requirements as follows:

TV Surveillance System (Line item 0001): SIC Code 3663
Fireworks Display: SIC Code 7999

Pat prepared an analysis of the sources identifying for each firm:

1. Non-Labor Surplus (NLS) or Labor Surplus Area (LSA) status
2. No. of Employees and Annual Gross Receipts
3. A brief description of the firm's primary purpose.

Pat has copied the applicable pages from the FAR for identifying the size standard.

Note: Size standards are based on numbers of employees or annual receipts.

Directions:

Using Pat's analysis and the FAR pages, answer the questions on pages 7-6 and 7-9. Make the set-aside decision for the fireworks and TV surveillance system requirements using the information provided in this case study, the text reference, the PRs, and market reports. **Follow the directions; do not make any assumptions!**

T.V. Surveillance Systems

Source/ZIP	No. of Employees	Annual Receipts	Description of Firm
1. Mountain West Alarm Supply Co./85064 NLS	55	.5 M	Provides guard service and installs alarm systems in commercial businesses.
2. Hirsh Electronics/92714 NLS	1,000	122 M	Manufactures sophisticated equipment
3. Whelen Engineering Co./06412-1036 NLS	10	81.2 M	Designs electrical systems for DOD major weapons systems
4. VisiCon, Inc./60015 NLS	26	Not Given	Retail store selling computers, cameras, TVs and other video equipment
5. Faraday, Inc./49286 NLS	8	Not Given	Distributor of Electronic Components
6. RACO/94608 NLS	135	10.8 M	Installs sophisticated surveillance equipment in large office complexes
7. District Security/60447 LSA	16	Not Given	Provides industrial and commercial security guard service
8. Custom Built/21217 NLS	815	205 M	Designs and manufactures sophisticated electronic surveillance equipment
9. Metropolitan International Investigation/21218 NLS	9	Not Given	Private investigators specializing in office thefts
10. Advance Security, Inc./31589 NLS	1,200	185 M	Manufactures electronic tracking equipment for DOD
11. Globe Security Systems/15097 NLS	1000	215 M	Manufactures electronic equipment custom built to specifications

TV Surveillance Systems (Continued)

Source/ZIP	No. of Employees	Annual Receipts	Description of Firm
12. Sentry Protection Systems/ 01390 NLS	225	50 M	Provides security guard service nationwide
13. A-1 Security Systems/ 21735 NLS	550	Not Given	Manufacturer of Electronic Equipment for Fortune 500 companies
14. ADT Security/25312 LSA	18	Not Given	Installs residential security systems
15. Electronic Equipment/ 19702 NLS	10	Not Given	Local Retail Sales of Video and Computer Equipment
16. American Sound & Security/ 21852 NLS	25	Not Given	Wholesale Distributor of Security Systems
17. Best Security Systems Co./ 21108 NLS	65	15 M	Provides residential security guards and burglar systems
18. Day and Night Home Security Inc./26003 LSA	Not given	Not given	Installs residential burglar equipment
19. Alarm and Security Systems/13011 NLS	800	654 M	Manufacturer of electronic surveillance equipment and systems (Residential and Commercial)
20. Tri-State/29440 NLS	1000	123 M	Manufacturer of electronic surveillance equipment

Set-asides and 8(a) Program

1. Which size standard is applicable?
2. List all firms by number that meet the small business size standard.
3. List the firms by number that meet the small business size standard and are located in a labor surplus area.
4. List other firms by number that are in a labor surplus area.
5. List the firms by number that **can** provide the product as the prime contractor.
(see the market report for TV surveillance)
6. Should Pat set-aside this procurement? If yes, which set-aside program?
7. What is the basis for your decision?

Fireworks

Source/ZIP	No. of Employees	Annual Receipts	Description of Firm
1. Atlas Display/03063 NLS	15	1.5 M	Designs and presents fireworks for fairs, celebrations, etc.
2. Extravaganza/22127 LSA	36	14 M	Designs and presents fireworks for fairs, celebrations, etc.
3. Bursting Light Co./19839 NLS	9	.750 M	Designs fireworks and water light shows
4. Creative Fireworks/22306 NLS	45	3.2 M	Designs fireworks shows.
5. Show Stoppers/21701 LSA	32	25 M	Designs and presents fireworks for fairs, celebrations, etc.
6. Professional Display/25143 LSA	16	3 M	Designs and presents fireworks for fairs, celebrations, etc.
7. American Images/43207 NLS	22	3.5M	Designs and presents fireworks for fairs, celebrations, etc.
8. Show of Shows/21740 LSA	100	65M	Designs and presents fireworks for fairs, celebrations, etc.
9. Light Up the Night/19805 LSA	35	22 M	Designs and presents fireworks for fairs, celebrations, etc.
10. Industrial Light Show/06101 NLS	5	.3 M	Designs and presents fireworks for fairs, celebrations, etc.
11. Illinois Fireworks/61830 LSA	155	95M	Manufactures fireworks for Commercial and General Public Use
12. Brilliant Fireworks/08222 NLS	15	3 M	Distributor of Fireworks

Set-asides and 8(a) Program

Fireworks (Continued)

Source/ZIP	No. of Employees	Annual Receipts	Description of Firm
13. Ohio Fireworks Co./43880 NLS	325	156 M	Manufactures fireworks: All kinds
14. Burnett Fireworks/73616 NLS	75	20 M	Manufactures fireworks: All kinds
15. Vitale Fireworks/15367 LSA	25	5 M	Manufacturer of fireworks
16. Elkton Fireworks Co./ 21901 NLS	60	22 M	Manufactures fireworks: All kinds

1. Which size standard is applicable?
2. List the firms by number that meet the small business size standard.
3. List the firms by number that meet the small business size standard and are located in a labor surplus area.
4. List other firms by number that are in a labor surplus area.
5. Should Pat set-aside this procurement? If yes, which set-aside program and list the companies by number?
6. What is the basis for your decision?

CLASS EXERCISES

LESSON 8: COMPETITION

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Competition

CASE STUDY 8-1
"I Only Have Suits for You"

Neville Wright received a requirement on August 15, 1990 to purchase chemical protective suits for the Marines to be dispatched to Saudi Arabia in support of Operation Desert Shield.

The PR was fully funded using current year funds at \$500 each suit for a total quantity of 58,000 suits or \$2.9 million.

The suits in the U.S. inventory are obsolete and will not work effectively with the type of chemicals anticipated during this conflict.

The PR recommended the British Defense Ministry be contacted since the British Government has licensed the technology for protective chemical suits to certain British companies.

Neville contacted the British Defense Ministry and learned that 5,000 suits are immediately available through one company, Dodd & Dodd, Inc.. Dodd & Dodd is the only British firm that has an established current production line for these suits.

Neville received a copy of the DLA Industrial Preparedness Planning Program List which identified a manufacturer that has developed a prototype of the chemical protective suit which has not yet been tested nor has a current production line for the item.

Neville's supervisor directed him to proceed with the procurement on an "other than full and open competition" basis.

Neville ruled out exceptions for Industrial Mobilization and Authorized or Required by Statute.

YOUR JOB IS TO: Help Neville identify the correct exception.

- a. Select one exception and provide justification for its use.
- b. Give the reason why you did not select the other exceptions.
- c. Be prepared to defend your decision in the class discussion.

Provide your answers on the following page.

- d. **DO NOT MAKE ANY ASSUMPTIONS!**

Competition

Case Study 8-1

<u>ONLY ONE RESPONSIBLE SOURCE</u>
<u>UNUSUAL AND COMPELLING URGENCY</u>
<u>INTERNATIONAL AGREEMENT</u>
<u>NATIONAL SECURITY</u>
<u>PUBLIC INTEREST</u>

Competition

CASE STUDY 8-2
"Let's Make a Deal"

Scenario: Neville Wright began processing a procurement for rayon yarn for the space shuttle when he came across this letter and attached document:

DIRECTIONS: Read the letter carefully.

National Aeronautics and Space Division
Ross Space Flight Center
Orlando, FL 30445
January 30, 1992

Eagle Industries
7245 Battlefield Blvd.
Memphis, TN 26488

Gentlemen:

In the near future this activity will be releasing a solicitation for the procurement of rayon yarn that is crucial to the space shuttle and some military weapons. At the present time, Eagle Industries is the sole qualified producer of this yarn.

In accordance with the Federal Acquisition Regulation, paragraph 6.202, we have determined that it is in the interest of national defense to exclude your firm from responding to this solicitation. By this action, we hope to qualify a second source and thereby increase the manufacturing base available to furnish this product to the government in case of national emergency or industrial mobilization.

We look forward to your participation in future solicitations for this yarn.

Sincerely,

Lynn Barker

Lynn Barker
Contracting Officer

Competition

National Aeronautics and Space Division
Ross Space Flight Center
Orlando, FL 30445

DETERMINATION AND FINDINGS

Upon the basis of the following findings and determination which I hereby make as agency head pursuant to 10 U.S.C. 2304(b)(1)(B), the proposed contract action described below may be awarded using full and open competition after exclusion of Eagle Industries.

FINDINGS

1. It is proposed that National Aeronautics and Space Division, Orlando, FL acquire, by negotiation 824,000 lbs. of rayon yarn to be used to coat the solid rocket booster nozzles for the space shuttle. The total estimated cost is \$19 million.
2. The aforementioned source is the source which can be expected to receive an award for the above requirement.
3. It is necessary to establish or maintain an alternative source or sources through the use of full and open competition after exclusion of the aforementioned source. Delay in qualifying a second source will result in the limited production of 300 lbs. of rayon yarn per month from the current source. The requirement for the production is 800 lbs. per month, a level beyond the capability of a single supplier. At the present time, NASD is filling 1987 requirements and anticipates increased requirements during FY 92 as the supply of the yarn is diminishing. Production lead time for a second source is 190 days; therefore, it is imperative that increased production capability be sought.
4. The exclusion of the aforementioned source will be in the interest of national defense to have a supplier available for furnishing the above supply to ensure an uninterrupted supply of the material for long term needs and in case of national emergency or industrial mobilization.

DETERMINATION

It is in the interest of national defense to exclude a source from the proposed contract action in order to have suppliers available for furnishing the above supply in case of a national emergency or industrial mobilization.

Frederick A. Allen

Agency Head

Competition

CASE STUDY 8-2
"Let's Make a Deal"

DIRECTIONS: Answer the questions in the space provided.

QUESTION 1: What is the intent of this letter?

QUESTION 2:. What type of competitive or noncompetitive procedures will be used to fulfill this requirement?

QUESTION 3: Do you think this procedure is fair?

Competition

CASE STUDY 8-3
"A Justifying Lesson"

Scenario: Pat Rivers received the sole source package for the previous procurement for the X-ray equipment from Gene Poole. Pat prepared her justification using the same information. Both Gene Poole, Program Manager and Bobbie Tyler, Technical Specialist signed Pat's justification.

Directions: Read the memo and attached justification from Gene Poole. Acting as the contracting officer, critique the justification prepared by Pat Rivers by answering the questions on pg. CE 8-19. The TR may be used when preparing your answers.

MEMORANDUM

From: Gene Poole

To: Pat Rivers

Subj: J&A for X-Ray Fluoroscopic Systems

Attached is a copy of the J&A that was used by one of the regional offices for the previous procurement for this requirement. All of the information applies to the current procurement. Make minor changes where appropriate.

Don't hesitate to call if I can be of further assistance.

Competition

Previous J&A

JUSTIFICATION AND APPROVAL FOR OTHER THAN FULL AND OPEN COMPETITION (SOLE SOURCE)

1. **AGENCY AND CONTRACTING ACTIVITY** This acquisition is being made for the Forest Hill Federal Management Office, Denver, Colorado, Office of Parks & Recreation by the Contracting Department, Federal Department of Administrative Services.
2. **DESCRIPTION OF ACTION** The action to be approved is for the acquisition of Quality Detection Systems, Inc. X-ray fluoroscopic systems to be utilized in the National Museum of Native American History.
3. **DESCRIPTION OF SUPPLIES/SERVICES** The supplies required are two (2) Quality Detection Systems, Inc., X-Ray fluoroscopic systems, part number 58367, for the National Museum of Native American History. The system consists of an adjustable X-ray beam collimator, indicator lights and meters, and built-in thermal overload protection. The system has a unique continuous output X-ray beam rated at 80kV peak at 3mA; able to be reliably used in screen fluoroscopy with conventional or Polaroid X-ray film. The Government's estimated cost is \$50,000.
4. **AUTHORITY CITED** This acquisition is being performed pursuant to 41 U.S.C. 253(c)(1) as implemented by Federal Acquisition Regulation 6.302-1 since the required supplies are available from only one responsible source and no other type of supplies will satisfy agency requirements.
5. **REASON FOR AUTHORITY CITED** The above specified supplies are required to insure proper operation, and to provide the necessary reliability in securing the National Museum of Native American History and its contents, as well as for the safety of the staff and visitors. Quality Detection Systems, Inc. is the only known source that carries the continuous output X-ray beam. Without the use of this equipment, ample security of the Museum and others would be at risk.
6. **EFFORTS TO OBTAIN COMPETITION** The requiring activity indicated that research had been conducted to provide alternate sources. Other sources have not been identified. Quality Detection Systems manufactures all the parts in the system.

7. **FAIR AND REASONABLE DETERMINATION** It is the contracting officer's determination that the anticipated cost to the Government will be fair and reasonable based on the market value of the complete unit and previous procurements for similar systems.

8. **INTERESTED SOURCES** Specifications for competitive procurement of these items are not available and cannot reasonably be made available to assure that the parts from another manufacturer would have the required functions. This X-ray fluoroscopic system is proprietary to Quality Detection Systems, which is the only source capable of assuring safe dependable and effective operation of equipment.

9. **ACTIONS TO INCREASE COMPETITION** Other major manufacturers are not expected to produce an acceptable continuous output X-ray beam for the Quality Detection Systems' X-ray fluoroscopic system.

10. **CONTRACTING OFFICER'S CERTIFICATION:**

I certify that the facts and representations under my cognizance which are included in this justification are accurate and complete to the best of my knowledge and belief."

NAME **Ann Patterson** DATE **January 8, 1990**

TITLE **Contracting Officer** SIGNATURE **Ann Patterson**

11. **TECHNICAL CERTIFICATION:**

I certify that the supporting data under my cognizance which are included in the justification are accurate and complete to the best of my knowledge and belief.

NAME **Paul Lucas** DATE **January 3, 1990**

TITLE **Technical Specialist** SIGNATURE **Paul Lucas**

12. **REQUIREMENTS CERTIFICATION:**

Competition

I certify that the supporting data under my cognizance which are included in the justification are accurate and complete to the best of my knowledge and belief.

NAME **Diane Hall** DATE **January 3, 1990**

TITLE **Program Manager** SIGNATURE *Diane Hall*

13. **APPROVAL:**

NAME **Ann Patterson** DATE **January 8, 1990**

TITLE **Contracting Officer** SIGNATURE *Ann Patterson*

Competition

Directions: Critique the **proposed** justification and answer the questions that follow.

JUSTIFICATION AND APPROVAL FOR OTHER THAN FULL AND OPEN COMPETITION (SOLE SOURCE)

1. **AGENCY AND CONTRACTING ACTIVITY:** This acquisition is being made for the Forest Hill Federal Management Office, Headquarters, Office of Parks & Recreation by the Contracting Department, Federal Department of Administrative Services.
2. **DESCRIPTION OF ACTION:** The action to be approved is for the acquisition of Quality Detection Systems, Inc. X-ray fluoroscopic systems to be utilized in the Desert Storm Museum.
3. **DESCRIPTION OF SUPPLIES/SERVICES:** The supplies required are four (4) Quality Detection Systems, Inc., X-Ray fluoroscopic systems, model number 58367, for the Desert Storm Museum. The system consists of an adjustable X-ray beam collimator, indicator lights and meters, and built-in thermal overload protection. The system has a unique continuous output X-ray beam rated at 80kV peak at 3mA; able to be reliably used in screen fluoroscopy with conventional or Polaroid X-ray film. The Government's estimated cost is \$104,000.
4. **AUTHORITY CITED:** This acquisition is being performed pursuant to 41 U.S.C. 253(c)(1) as implemented by Federal Acquisition Regulation 6.302-1 since the required supplies are available from only one responsible source and no other type of supplies will satisfy agency requirements.
5. **REASON FOR AUTHORITY CITED:** The above specified supplies are required to insure proper operation, and to provide the necessary reliability in securing the Desert Storm Museum and its contents, as well as for the safety of the staff and visitors. Quality Detection Systems, Inc. is the only known source that carries the continuous output X-ray beam. Without the use of this equipment, ample security of the Museum and others would be at risk.
6. **EFFORTS TO OBTAIN COMPETITION:** The requiring activity indicated that research had been conducted to provide alternate sources. Other

sources have not been identified. Quality Detection Systems manufactures all the parts in the system.

Competition

7. **FAIR AND REASONABLE DETERMINATION** : It is the Contracting Officer's determination that the anticipated cost to the Government will be fair and reasonable based on the market value of the complete unit and previous procurements for similar systems.

8. **INTERESTED SOURCES**: Specifications for competitive procurement of these items are not available and cannot reasonably be made available to assure that the parts from another manufacturer would have the required functions. This X-ray fluoroscopic system is proprietary to Quality Detection Systems, which is the only source capable of assuring safe dependable and effective operation of equipment.

9. **ACTIONS TO INCREASE COMPETITION**: Other major manufacturers are not expected to produce an acceptable continuous output X-ray beam for the Quality Detection Systems' X-ray fluoroscopic system.

10. **CONTRACTING OFFICER'S CERTIFICATION**:

I certify that the facts and representations under my cognizance which are included in this justification are accurate and complete to the best of my knowledge and belief."

NAME **Sydney Ross** DATE **October 29, 1991**

TITLE **Contracting Officer** SIGNATURE **Sydney Ross**

11. **TECHNICAL CERTIFICATION**:

I certify that the supporting data under my cognizance which are included in the justification are accurate and complete to the best of my knowledge and belief.

NAME **Bobbie Tyler** DATE **October 27, 1991**

TITLE **Technical Specialist** SIGNATURE **Bobbie Tyler**

12. **REQUIREMENTS CERTIFICATION:**

I certify that the supporting data under my cognizance which are included in the justification are accurate and complete to the best of my knowledge and belief.

NAME **Gene Poole** DATE **October 27, 1991**

TITLE **Program Manager** SIGNATURE **Gene Poole**

13. **APPROVAL:**

NAME _____ DATE _____

TITLE _____ SIGNATURE _____

Competition

Directions: Answer the questions in the space provided.

CASE STUDY 8-3
"A Justifying Lesson"

QUESTION 1. Identify the areas by number Pat changed for the current justification.

QUESTION 2. What is the title of the approving official for the previous J&A and why?

QUESTION 3. What is the title of the approving official for the current justification?

QUESTION 4. Is the authority cited appropriate for the procurement?

CLASS EXERCISES

LESSON 9: LEASE VS PURCHASE

TABLE OF CONTENTS

	PAGE NO.
Case Study 9-1	9-3
Scenario: "Give Me the Most for My Buck"	

Lease vs Purchase

Case Study 9-1
"Give Me the Most for My Buck"

Directions: Discuss in your group whether to buy or lease the TV surveillance system. You will need to analyze the PR and market report. Following the discussion, answer the questions and develop a list of pros and cons for your decision.

Question 1: What are the pros and cons of leasing vs. purchasing the TV surveillance system?

Question 2: Which factor (those addressed in TR pg. 9-5) most influenced your decision?

Question 3: Should the TV surveillance system be purchased, leased or both, or leased with the option to purchase?

Question 4: When would you solicit for all methods?

Lease vs Purchase

CLASS EXERCISES

LESSON 10: EVALUATION FACTORS FOR AWARD

TABLE OF CONTENTS

	PAGE NO.
Case Study.10-1	10-3
Scenario: "Selection by Evaluation"	

Evaluation Factors for Award

Case Study 10-1

"Selection by Evaluation"

Directions: Make the following decisions for the **TV surveillance** requirement.:

1. Determine the number of line items.

2. Determine the number of awards:
 - ☒single
 - ☒multiple
 - ☒progressive
 - ☒partial set-aside

3. Identify price and price-related factors (Exhibit 10-2, pg. 10-7):
 - ☒Foreseeable costs or delays
 - ☒Changes
 - ☒Economic advantage of one or multiple awards
 - ☒Federal, state and local taxes
 - ☒Origin of supplies

4. Review price related factors as a whole and determine whether any problems are anticipated (Exhibit 10-7, pg. 10-14):
 - ☒Unbalanced bids
 - ☒Front-end loading
 - ☒Inaccurate quantity estimates

5. Determine whether technical evaluation is needed.

Evaluation Factors for Award

Case Study 10-1
"Selection by Evaluation"
(continued)

Directions: Make the following decisions for the **fireworks** requirement.:

1. Determine the number of line items.
2. Determine the number of awards:
 - ¥single
 - ¥multiple
 - ¥progressive
 - ¥partial set-aside
3. Identify price and price-related factors (Exhibit 10-2, pg. 10-7):
 - ¥Foreseeable costs or delays
 - ¥Changes
 - ¥Economic advantage of one or multiple awards
 - ¥Federal, state and local taxes
 - ¥Origin of supplies
4. Review price related factors as a whole and determine whether any problems are anticipated (Exhibit 10-7, pg. 10-14):
 - ¥Unbalanced bids
 - ¥Front-end loading
 - ¥Inaccurate quantity estimates
5. Determine whether technical evaluation is needed.

Evaluation Factors for Award

CLASS EXERCISES

LESSON 11: METHOD OF PROCUREMENT

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	PAGE NO.
Case Study.11-1 Scenario: "Match the Method"	11-3
Case Study 11-2 Scenario: "Choose the Right One"	11-5

Case Study 11-1 "Match the Method"

Directions: Write the method(s) of procurement (small purchase, simplified purchasing, sealed bidding, two-step sealed bidding, or negotiation) in **Column B** that would apply to the statement in **Column A**. **Note:** More than one method may be applicable to a given statement.

COLUMN A	COLUMN B
1. The requirement can be fulfilled by a required source.	
2. The requirement is urgently needed.	
3. The prices of technically acceptable proposals will be revealed to the public before award.	
4. The requirement is under \$25,000.	
5. The award is based solely on price and price-related factors.	
6. The products can be purchased over-the-counter.	
7. The award is based on revised offers.	
8. The requirement is over \$25,000.	
9. The description of the requirement must be clearly stated.	
10. Two or more sources are expected to compete.	

Case Study 11-2 "Choose the Right One"

Directions: Place an X in the yes or no column as appropriate for the fireworks and TV surveillance requirements. Compare your findings with Exhibit 11-2 in your TR. Select the method of procurement for each requirement.

SELECTING THE METHOD OF PROCUREMENT				
Question	Fireworks		TV Surveillance	
	Yes	No	Yes	No
1. Is the dollar value \$25,000 or less?				
2. Is there an existing required source?				
3. Is time available to permit publicizing, soliciting in writing, receiving written responses, and evaluation?				
4. Will award be based solely on price and price-related factors?				
5. Is the requirement stated sufficiently to forego discussion?(if no, answer 5b.)				
5b. If discussions are needed, can you limit discussions to determining acceptability of the end item?				

SELECTING THE METHOD OF PROCUREMENT (Continued)				
Question	Fireworks		TV Surveillance	
	Yes	No	Yes	No
6. Are 2 or more sources expected to respond?				
7. What type of contract will be used?				

Question 1. What is the most appropriate method of procurement for the fireworks requirement?

Question 2. What is the most appropriate method of procurement for the TV surveillance requirement?

CLASS EXERCISES

LESSON 12: PROCUREMENT PLANNING

TABLE OF CONTENTS

	PAGE NO.
Case Study 12-1	12-3
Scenario: "Plan before you Procure"	

Procurement Planning

CASE STUDY 12-1

"Plan before you Procure"

Directions: Make a list of the areas your group would address in a procurement plan for the fireworks requirement by using the Procurement Plan Format (Exhibit 12-4) in the TR. List the topics only.

Procurement Planning

Directions: Make a list of the areas you should address in a procurement plan for the TV surveillance systems requirement. Be specific.

Procurement Planning